Transparent Content Integration – From Frontend to Backend

Open Text @ European Organization for Quality Annual Congress
Open Text Corporation – RedDot

- NASDAQ: OTEX
- Worldwide presence
- >3.500 employees worldwide
- >13.000 customer in 114 countries
- >20.000.000 Users
- **365 X 24 - Global Support Program** plus custom „Enterprise Support“
- **Largest independent provider of ECM - Enterprise Content Management solutions.**
Great International Customers Base (>13,000)

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<th>Pharmaceutical</th>
<th>Computer, Electronics, &amp; Information</th>
<th>Telecommunications</th>
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<td>HP, Packard, Ericsson, SAP</td>
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<td>Army Reserve</td>
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How the analysts see the Open Text portfolio

by Kyle McNeilis with Connie Moore and Eric Kim

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Innovate Corporation has deployed Livelink ECM and has created an Enterprise Library, with accompanying Records policies. Anne Kofsky, Innovate's Records Manager defines the classification rules for each type of business record.

Our marketing writer creates a new collateral and functional paper. The paper documents features of a new product release. Intended for Web and sales force.

The product manager checks with engineering and approves the paper. The collateral must be placed on WWW when the product announcement is out.

Quality assurance accepts the paper and agrees on announcement date. QA statement is returned to PM and marketing.

Sets-up the website to post the Livelink DMS documents on July 1st 10:00. Edits announcement for publication. Triggers translation. Puts advance information on the website.

Document will be on the website in time.
Innovate Corporation has deployed Livelink ECM and has created an Enterprise Library, with accompanying Records policies. Anne Kofsky, Innovate’s Records Manager defines the classification rules for each type of business record.

Customer sees the new product and decides to buy. Customer gets auto-feedback that the order is being processed. Customer receives a confirmation stating his order number; email feedback announced. RedDot triggers SAP sales process (SD).

Transparent, process-oriented integration: Web triggered sales process with end-2-end transparency

Website
- Customer sees the new product and decides to buy.
- Customer gets auto-feedback that the order is being processed.
- Customer receives a confirmation stating his order number; email feedback announced.
- RedDot triggers SAP sales process (SD).

SAP R/3
- SAP Order is booked and order confirmation is generated automatically.
- Sales receive SAP workflow, asking them for confirmation.
- Order confirmation, invoice & key are created in R/3, sent and archived.

Mail
- Customer sends a mail to enquire about the invoice and the key that seem to be missing.

CIM
Customer Information Management:
- Inside sales can see all relevant SAP data and DMS documents from within MS Outlook.
- Sales retrieves invoice and license key from the archive and sends the information again.
- Overview ➔ Speed ➔ Happy Customer!
The Enterprise Library – one Common Repository

Open Text Enterprise Library

Livelink ECM

Web Content Management

Groupware

CRM
Contacts
Opportunities
Leads

Livelink DMS
Contracts & Legal
Documentation
Office Documents

SAP
HR, Sales Processing,
Production, Plant Maint.

File System
Databases
CAD / CAM

SPS
Communication
Team / Spaces

Groupware

Microsoft

Lotus software

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RedDot CMS – Feature: Ease of Use

☑️ The **users** can be **in charge** of their content and **act as editors** because of the …

- intuitive RedDot SmartEdit Technology and the Site Manager
- WYSIWYG-environment
- „Direct Edit“ function in the page layout
- „RedDrops“, the Drag&Drop function for pictures, texts and tables
- permanent page preview
- highlighting of editable areas
- zoom-feature
- MS-Office integration for editing process
- automatic generation of bread crumb and sitemap
- separation of content and metadata through content classes
- reuse of the same content with different style templates

The users can be in charge of their content and act as editors because of the …
Location independent, web based use

- setting-up language version of a project with country specific formatting
- language specific linking, pages and workflows
- naming translators for individual language combinations
- automatic and manual triggering of translation process
- selecting pages for translation and defining exempted content
- release workflows
The marketing personnel can …

- Sets-up the website to display the Livelink DMS documents when the time has come.
- edit the announcements easily with an editor like MS Word. It’s just a click on the red dot …
- drag&drop a screenshot into the web page (RedDrop)
- trigger a translation and add country-specific content
- put advance information on the web without the help of an admin.
- have controlled ease of use!
Access via SAP – the SD Order Processing view for the SAP-guy
What the Standard does: overview over numbers – not over documents

Document Access via the individual SAP SD document
Livelink ECM Suite for SAP Solutions – DocuLink

How the salesperson can see all the related documents

- All documents related to a business process in one folder
- Unified view to information
- No modifications
- Uses SAP tables
- Uses SAP Business Objects
- Uses SAP Authorizations
- Jumps to respective SAP transactions
- Integrated in generic object services
- Add documents related to SAP transactions to SAP
- Individually extensible
System-spanning SD folder at VW Bank: CRM and R/3 documents, ArchiveLink and Content Server documents in 1 view

- Service Orders
- Sales Orders
- versioned CRM Contracts
- CRM Activities
- General mail traffic
Access via Customer Information Management and Mail - The Inside Sales’ View in the call center

Open Text Enterprise Library

Livellink ECM

Livellink DMS
Contracts & Legal Documentation Office Documents

SAP
HR, Sales Processing, Production, Plant Maint.

CRM
Contacts Opportunities Leads

WCM
Web Site, Web Shop Persuasive Content

Customer Information Management (CIM)

SPS
Communication Team Spaces

File System
Databases CAD/CAM
Customer Information Management – the functions required to answer the mail about the lost invoice

- Jump to SAP transaction
- SAP order
- Further relevant documents
- Document display
- Deliveries
- Invoices
Ease of use for email archiving – the endless mailbox can become reality – nothing is ever lost

- Offline function
- Web Access
- Secure
- Automatic and interactive
- No training
- Alternate access to email via Livelink is possible
Access via Livelink DMS – creating, releasing, managing complex documents in a controlled way
DMS Example: Contracts Management
Versioning, Audit trails, Reservation, Check-in/-out - full transparency

Check in and check out mechanisms
and comments for each version
....prevent inconsistencies
....show what happened, when and why.

Minor and major versions
....allow to distinguish between minor and major changes
which have been made to the contract.
....access control by version type

Release workflows
.... compliance with Corporate Governance rules
.... full transparency on participants & progress
.... extremely flexible process design
.... Quality Assurance
.... Electronic Signature
The Contract File: Transparent overview of all required information

The Header Section shows important data such as reference number, status, the contract type, contract parties or a reference to a frame agreement in order gain a quick overview.

The Contract Team area shows all the persons and their corresponding role(s) for a contract.

The contract itself as well as sub contracts are stored in the section Contract in a structured form.

Important contract related documents and information such as emails are stored in the section Contract Related Documents.

Tasks which have to be fulfilled in order to create and execute the contract are stored in the section Tasks.

Follow UPs which allow the monitoring of obligations and rights for a contract can be found in the section Follow Ups.
Example FDA Submission and Documentation: Advanced content creation with document fragments and XML
Livelink Records Management: securing legally relevant information over the long term

- Certified Records Management (DoD 5015.2 Chapter 2 + Chapter 4)
- Document Lifecycle Management
- Addresses long-term retention
- Does not require IT-technical knowledge
- Ties in with the application logic
Alternate Access from Sharepoint - when MOSS users take part and Live Communication comes in.
Sharepoint Integration: the mid- and long-term perspective for Sharepoint documents

- See metadata
- Edit document
- Delete links
- Display version history
- Easy document restore
- Classify document as record
- Faster backup
- reduced load on database
Access via the file system – how large document volumes in file shares join the ECM
Files can be
- replaced by shortcuts
- copied to Enterprise Server
- moved to Enterprise Server

File permissions remains
Search for lost files … and restore without backup

- Search for a file
- Restore a file or a file list
- Create a restore job
Open Text ECM – the Complete ECM Portfolio

Livelink ECM Solutions

**Industry Solutions**
- Life Sciences: Clinical Trials
- Financial Services: Customer Due Diligence
- Government: DOMEA
- Media, Manufacturing, Telecommunications
- Architecture/Engineering: CAD Manager/GISLink
- Energy/Exploration: Regulated Documents/IS-U Integration
- Pharmaceuticals: Collaborative Submissions

**Business Solutions**
- Internal Controls
- Program Management
- Litigation Support
- Accounts Payable
- Brand/Media Management
- Employee Folder
- Customer Information Management
- Contract Lifecycle Management
- Vendor Invoice Management
- Enterprise Publishing
- Training Management
- Quality Mgmt

**Enterprise Wide Solutions**
- Document Management
- Collaboration
- Knowledge Management
- Taxonomy Classification
- Communities of Practice
- Web Content Management
- High-Volume Imaging
- Enterprise Search
- Enterprise Archiving
- Content Lifecycle Management
- Records Management
- Business Process Management
- SAP Archiving & DocuLink
- File System Archiving
- eMail Archiving
- eMail Monitoring
- eMail Mgmt
- Sharepoint Archiving
- COLD & Pipeline Services
- Output/Renderings Management
With RedDot & Open Text: always dressed for the occasion...

Thank You!